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FinancialPlanning

Wealthtech Weekly

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By Rob Burgess
Reporter

I've been hosting and appearing podcasts for nearly a decade, and I've been listening for even longer. (I remember downloading "The Ricky Gervais Show" for my iPod Mini, but I digress.) You could say I'm passionate about the format.

This week, I spoke with advisors about why they produce their own podcasts and the tools they use.

Speaking of podcasts, I may be recording a few at next month's T3 Conference, which I'll be attending for the third year. (Stay tuned.) Will you be there? What are you looking forward to? What else should I do and see in Dallas?

Connect with Rob:

TOP STORIES

TECHNOLOGY

These are the tools advisors prefer for creating top-notch podcasts

Those who invested in quality equipment to produce their podcasts say it has been worth it.

- **How advisors are using podcasts to educate, engage and win clients**
  Those who have taken the time to produce this audio, and sometimes video, content say it's a valuable way to connect to prospects, clients and others in the industry.
- **Tech spending on the rise while advisors use just 60% of their tools**
  The 2025 Orion Advisor Wealthtech Survey indicates that more than half of financial advisors plan to increase their investment in technology — and that many aren't using large parts of their existing tech stacks.
- **The 10 best- and worst-performing actively managed ETFs of the past 3 years**
  With promises of potentially beating the market, actively managed ETFs can appear attractive to investors. But with higher fees and more potential

volatility, are they worth it?

- **2025 wealth management trends: Private equity, new ETF debuts**
  In the year ahead, private equity, exchange traded funds and tax-loss harvesting promise to be top priorities for advisors leading the pack.

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